Fact Sheet: Best Practices for Virtual Meetings

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Prior to the pandemic and its impact on in-person interactions, foundations were only marginally using virtual technology to organize their meetings, usually only when distance between meeting participants was a factor. However, the "new normal" has impacted foundation operations and inter-personal communications in ways that weren't experienced in the past.

If virtual meetings are not well organized and run, productivity and inclusivity can be directly impacted. Participants may try to multitask, organizers might not be as focused, certain participants may dominate the conversation and make it less engaging for others, and a lack of meeting comfort can lead to multiple inaudible conversations taking place at the same time.

Like in-person meetings, there are best practices that can be implemented to mitigate those situations and others that may arise that can disrupt an effective meeting. These best practices will ultimately lead to engaging and focus virtual meetings.

1. **Create meeting standards**
    By creating standards, virtual meeting participants will come to the meeting with a shared understanding of meeting norms. This will help in their preparation for and communication in the meeting. Here are a few examples you may choose to adopt:

    ● Place your microphone on mute when you are not speaking and don't forget to unmute when you do speak
    ● Establish a protocol for when a participant wants to speak and share that with all participants

- Outline when and how participants can respond (i.e. a question answer period, respond in the chat, or have participants send their replies to a designated moderator)
- Encourage participants to find a quiet place in their home/office, if possible
- Make sure the meeting app is accessible (financially and technologically) by all participants and that you have provided all the information necessary to connect to and use the technology
- Test the technology prior to the meeting, including the use of any documents that will be shared on the presenter's screen during the meeting
- If there are any technical problems, know who the right individual is to help
- Don't multitask on multiple apps during the call
- **As a participant**, pay attention to what is being said and be ready to share your perspective

2. **Role of the meeting organizer**
   The role of the meeting organizer, for the most part, is the same for an in-person meeting as it is for a virtual meeting.

   Like all well-run meetings, make sure to prepare and share an agenda and, if as organizer you are not running the meeting, identify prior to the meeting who will be the facilitator and notetaker.

   For virtual meetings, it is critically important to plan for technical support as nothing is more frustrating than finally getting everybody together for a meeting and technology gets in the way.

3. **Manage technical issues**
   For people new to using virtual meeting apps, spend some time with them prior to the meeting to show them the ins and outs of the app. Even things as basic as signing in, using audio, using video, sharing their screen and/or sharing documents. Show them how to troubleshoot any minimal technical glitches. Keep in mind that a person's age, or their regular access to technology, will affect their comfort with the software. Anticipate whom among your attendees may need additional support, and reach out beforehand whenever possible.

   Make sure that you have some type of plan should you need technical support as problems do occur when people are online.

4. **Create a familial or personable environment before the actual meeting begins**
Consider this the small-chat that happens before an in-person meeting. Just because you're meeting virtually, doesn't mean that all informal conversation is verboten prior to the meeting. Create a positive and welcoming environment for your attendees before you begin the meeting. Engage with them on some casual talks or how they're doing, etc. Make them feel comfortable and allow them to indulge in the conversation. As the organizer, try to gauge how they are feeling when they e-meet.

5. **Using video**
You wouldn't attend an in-person meeting without seeing the faces of those participating. The same holds true for virtual meetings. There are so many virtual meeting apps now on the market. Talk to others who you know and whose opinion you value to find the right one for your foundation.
   - Video meetings are more effective when people can see each other's facial expressions and body language. Ask individuals to sit close to their webcam to help to recreate the intimacy of an in-person meeting.
   - When you use a good virtual meeting tool/software, you have different levels of flexibility to humanize and civilize the meeting room for your attendees.
   - When they are able to watch each other speaking and listening, attendees will feel motivated to participate more.
   - In 1–1 meetings, leverage the privacy and allow them to share their thoughts with the concerned person.

   That said, always provide an audio dial-in option. Video conferencing can work very well, but it relies on a strong internet connection that may not always be available. People need the ability to participate via audio, but make it clear that video-first is the new norm.

6. **Minimize presentation length**.
The only thing worse than a long presentation in person is a long presentation during a virtual meeting.

Meetings should be discussions. Background information should be provided beforehand.

If someone needs to present, use screen sharing to guide the conversation, so attendees can literally "be on the same page." But prioritize conversation to maximize the time people are looking at each other.

7. **Call on people**.
   Getting everyone to participate without talking over each other is one of the more challenging aspects of running a virtual meeting. We recommend:
   - Periodically calling on individuals to speak, even by virtually "going around the table" before a decision is finalized. Some software packages even allow attendees to "raise a hand" if they want to. This can help the facilitator drive closure without the risk of excluding an introverted participant's views.
   - Foster collaboration to motivate and encourage them.
   - Try to roll out 1–1 meetings if required

8. **Capture real-time feedback**.
   Gathering and processing high-quality input during a virtual meeting can be challenging, especially since visual cues are harder to read.
   - Use a phone-based survey tool like Poll Everywhere to collect on-demand feedback from attendees on specific topics in real time.
   - Keep the polling open, separate from the videoconference to avoid disrupting the conversation.
   - Collect feedback from all of the members.
   - Try to understand what could have been done better or differently to further improve.
   - Check on the tool being used (i.e. Zoom, Google Hangouts, etc), and how comfortable your attendees are and how they use the system.
   - Provide brainstorming and sticky note activities.

9. **Don't be afraid to tackle tough issues**.
   Meeting virtually is a learned behavior, and you'll be amazed how much you can get out of it once you and your team begin to be comfortable working this way. It may seem natural to wait to discuss tough issues until everyone is in person, but that may not be an option. So don't shy away from controversial topics. Additional tips include:
   - Promote honesty and transparency.
   - Help them be more open and share their opinions and thoughts with their team members.
   - Show respect to everyone.
   - Allow them to argue in a healthy way, but not heat the discussion

10. **Practice once or twice while you're still together**. Hold your next staff meeting virtually, with each executive sitting in their office and hooking into the meeting with no assistance. After the meeting concludes, gather and debrief about the experience. What went well, and what didn't? How can you evolve your virtual meetings to make them as productive as when you meet in person?

    Not being able to work together in the same room with colleagues may become a major challenge in the next few weeks. To make virtual meetings work, you might need to adjust how your team conducts them. But a small investment in preparedness now could have a huge impact if that time comes.

11. **Ensure you have the appropriate moderation.**
    Meeting moderation is critical to ensuring all participants feel heard, and all necessary content is being covered. The moderator should have all the details ready with them so that they can address any critical items in a timely fashion. Always ensure before starting that participants are able to clearly hear and watch the moderator throughout the video meeting.

12. **Send clear meeting minutes.**
    After the meeting is over and feedback is shared for you to consider, you will need to send out clear minutes of meeting to the people. It should inspire them to read and adhere to it. To create effective meeting minutes:
    - Outline action items or deliverables that were brought up during the meeting
    - Avoid miscommunication by ensuring all parts of the meeting have been recorded
    - Provide information on the next meeting(s)